

FY 2014 IDEA Budget Tips & Reminders

1. **Assurances:** (timeline – late August) IDEA assurances will be accepted using a “digital signature” process. There will no longer be a need to print a paper copy, sign it, and load it back into the software. The district will receive a user name and password which represents the role of district administrator. The district administrator will sign into the software, review and sign off on the assurance sections electronically. This will be recorded as the district’s acceptance of the IDEA requirements regarding the district’s eligibility and use of federal funds.
2. **Due Date:** Due the lateness of the budget software opening, the due date for the flow-through and preschool budget submissions will be Friday, Aug. 2, 2013. In a normal year, the budgets and assurances are due July 1. Understandably, there may be issues meeting this deadline. However, as a reminder, there is no requirement to have the LEA’s entire allocation budgeted prior to submission (not even a percentage). The only LEAs that are required to have any amount of budget completed prior to submission are LEAs that have been identified as having significant disproportionality and must budget 15% of their allocation for coordinated early intervening services. If there is a reason why the August 2 deadline cannot be met (for instance, the budget coordinator is on vacation until August 10), please e-mail the Special Education consultant assigned to your district (http://sped.dpi.wi.gov/sped_sepcontact) and provide a date by which the budgets will be submitted.
3. **Switching Fiscal Years:** From here on out, whenever a user logs into the IDEA entitlement budgets, the FY 2014 budgets will appear. To return to FY 2013 for budget amendment and claiming purposes, click on the hyperlinked words “Go To Prior Year 2012-2013” at the top of the page.



4. **Budget Activation:** Fiscal Year 2014 budgets need to be activated by the district. Until this activation takes place, the LEA can see their budgets but do not have buttons available to add any entries. Activating a budget is very simple. When a user logs into the special education web portal and selects the hyperlink to the Flow-through and Preschool Entitlement Budgets, the user is taken directly to the “Add District to List of Participating Agencies” page for fiscal year 2013-14. Once the LEA is added, the user is taken directly to the contacts page (see #5). If you are a Third Party Grant Administrator, first add your own agency and then contact information. Return to the Budget Menu and click on the “Modify List of Participating Agencies” and add the next LEA in the consortium. Add contacts for the LEA (the business office contact should be an employee of the LEA) and then repeat these steps for the remaining consortium LEAs.
5. **Adding Budget / Claim Contacts:** Each LEA must provide **both** a budget contact and a business office contact. The person listed as the budget contact will be the individual contacted by DPI regarding questions specific to the budget application. The person listed as the business office contact will be the individual whose name appears on the claim form. The LEA can add additional contacts if desired. All of the contacts are defaulted to receiving generated e-mails regarding approval of budgets and claims. If a contact doesn’t wish to receive this correspondence, simply check the box for “CC Budget Correspondence” clear. If the contact person also wishes to receive the IDEA fiscal listserv messages, check the box for this option.

Short tutorial on adding contacts: <http://screencast.com/t/tMfnOUTPV> (example is from FY 2012-13, but the process is the same)
6. **Carry Over:** Final carry over amounts are not added into the software until November. However, users can enter their own estimated carry over amounts into the budget software for budgeting purposes (the

estimated carry over amount is added to the allocation). Carry over amounts can be accessed through the “Maintain Budget Funding Amounts” hyperlink on the Budget Main Menu. Reminder: All unspent funds from the prior year are carried over into the new year. There is no 25% cap or waiver requirement. For more information please see <http://sped.dpi.wi.gov/files/sped/pdf/idea-carryover.pdf>

7. **Coordinated Early Intervening Services:** There is no due date for coordinated early intervening services or narratives (except for those LEAs that have been identified as significantly disproportionate).